

Project Management Meets Change Management – A Success Story

**Focus Area: Tech Perspectives
TI012SN**



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Title: System Integration Analyst**

Abstract



- Utilizing the concepts and terminology from Project Management, the process of planning and executing a Change Management (CM) Infrastructure improvement project is described. The primary audience for this presentation includes both experienced and relatively new CM administrators and their managers. It also includes anyone with an interest in the application of project management knowledge to CM administration. There are several benefits: the complexity of the CM tool technology is more manageable, CM administrators get to use project management knowledge to complete a project (not "firefighting"), improve relations with your customers (that means developers and managers), and get the opportunity to do it again.

Biography



- Wayne Hall
Staff Integration Analyst, Lockheed Martin Space Systems
- Last 10 Years in Software Configuration Management
 - All Fusion Harvest Change Manager
- Work Experience: 25+ Years in Information Technology
- Education: MS Engineering, BA Mathematics
- User Communities: CMCrossroads

Agenda



- **Project Management Concepts and Terminology**
- **Change Management Infrastructure**
- **Project Plan**
- **Lessons Learned**
- **Session summary**

Project Management Concepts and Terminology



Project Management

Concepts and Terminology



- **Project Management**
- **Stakeholders**
- **Scope**
- **Work Breakdown Structure**
- **Schedule**
 - **Gantt Chart**
 - **Critical Path**
- **Triple Constraint**

Project Management

Concepts and Terminology



- **Project**
 - **A Temporary Endeavor Undertaken to Create a Unique Product or Service**
 - **Temporary - definite beginning and definite end**
 - **Unique - has not been done before**
- **Project Management**
 - **Meet or exceed stakeholder needs and expectations**
 - **Knowledge, skills, tools, techniques**

Project Management Concepts and Terminology



- **Stakeholders**
 - **Active Project Involvement**
 - **Interests Impacted by Project**
- **Scope**
 - **Summary of products and services**
 - **Depicted in the Work Breakdown Structure**

Project Management Concepts and Terminology - Stakeholders



Service Provider / Stakeholder	Responsibility	Required Support
Wayne	Project Lead	Overall Project Success
Teri	Project Lead Backup	Harvest Administration
Tom	On-site consultant	CAI Software Installation Oversight, Test Plan
Kristie	Configuration Management	UNIX subsystem integration
Mike	File Server Administration	Software Installation and Configuration
Melissa	Database Administration	Software Installation and Configuration
Thanh	Web Master	Software Installation and Configuration
Dennis	User testing and training	Harvest application users
Jimmy	Windows Desktop support	Client system access
Steve	UNIX support	UNIX Client, server system access

Project Management

Concepts and Terminology - Scope



- **The Harvest r7 project when complete will accomplish the following objectives:**
 - **Establish the production instance of Harvest on a Windows 2003 server**
 - **Establish LAN-based software build facility**
 - **Installation and configuration of Harvest v7.1**
 - **Provide the foundation of CM support for UNIX-based application systems.**
 - **Establish the web-browser as the standard Harvest client**
 - **Install and maintain a second server that supports development and test of ITS CM infrastructure.**

Project Management

Concepts and Terminology - Scope



- **Benefits of this project include:**
 - **Migration to contemporary, supported systems**
 - **Introduction of automated build processes**
 - **Use improvements made to Harvest**
 - **Standard cross-platform CM processes**
 - **Web browser usage reduces maintenance cost**
 - **Dual development/production environment in CM infrastructure**

Project Management

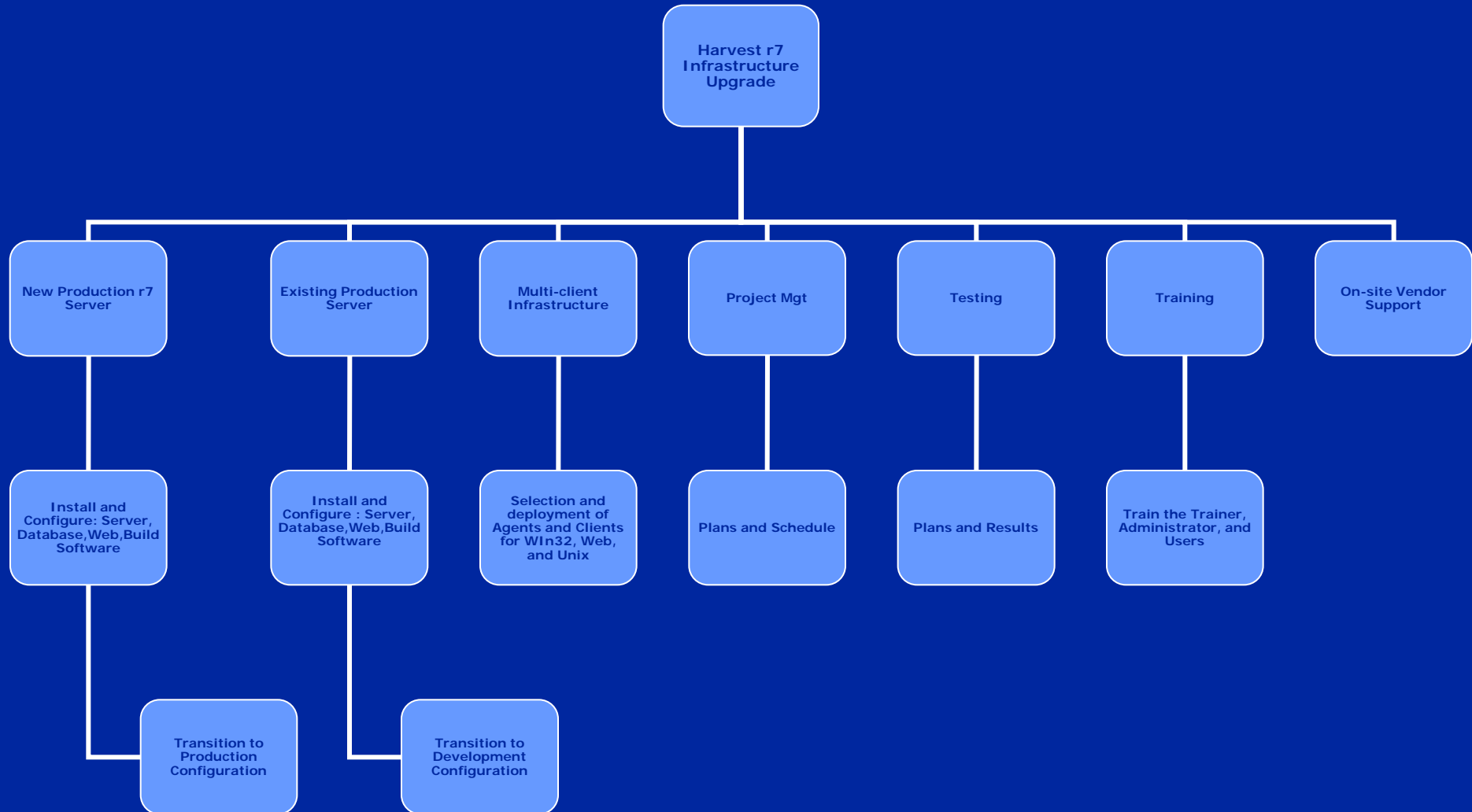
Concepts and Terminology - WBS



- **Work Breakdown Structure**
 - **Defines Total Project Scope**
 - **Deliverable-oriented**
 - **Project Element Grouping and Organization**

Project Management

Concepts and Terminology - WBS



Project Management

Concepts and Terminology



- **Schedule – Activities and Milestones**
- **Gantt Chart and The Critical Path**

Project Management

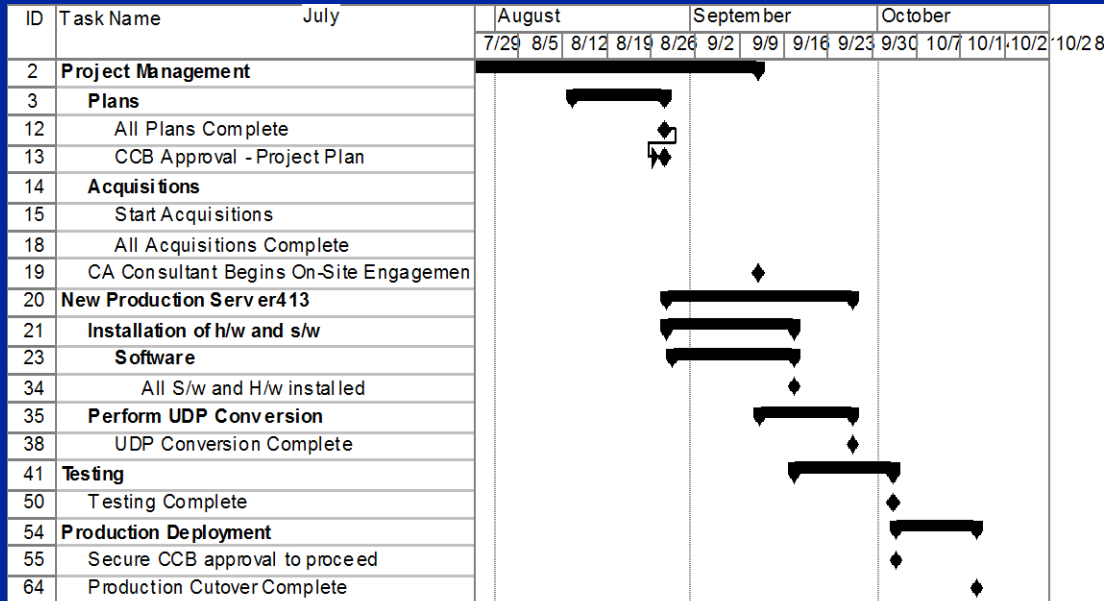
Concepts and Terminology – Milestones



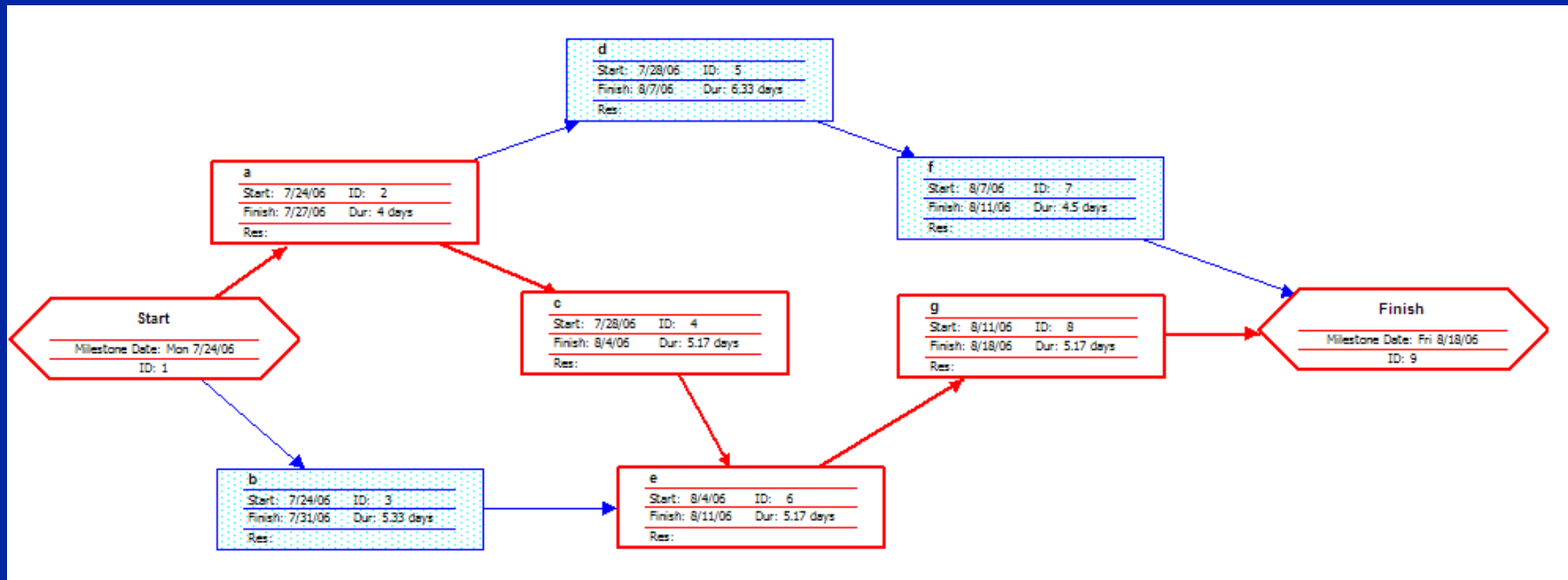
- **Project Plan Approval by CCB**
- **All Acquisitions Complete**
- **Consultant begins on-site engagement**
- **All software and hardware installed**
- **Production Cutover Complete**

Project Management

Concepts and Terminology – Gantt Chart, Milestones



Project Management Concepts and Terminology – Network Diagram, Critical Path



Project Management

Concepts and Terminology – The Triple Constraint



Change Management Infrastructure



Change Management Infrastructure - Processes



- **Change Request - Documents requirements**
 - Enhancements (Scope change)
 - Bug fixes
 - Emergency fixes
- **Change Notice – Details changes**
 - System specific
 - LAN (Windows, Unix) or Mainframe (z/OS)

Change Management Infrastructure - Resources



- **Configuration Management customers**
 - Project leads
 - Developers
- **Configuration Management**
- **Change Control Board**

Change Management

Infrastructure Resources – CM Customers



- **Project leads**
 - Responsible for new and existing systems
 - Attend CCB as a key stakeholder
- **Developers**
 - Use CM Tools
 - Interact with CM directly

Change Management

Infrastructure Resources - CM



- **Configuration Management**
 - **Supports and facilitates the Change Control Board**
 - **Administers and maintains CM toolset**

Change Management

Infrastructure Resources – Change Control Board



- **Consists of CM and IT managers**
 - **CM Facilitates**
 - **Managers review and vote**
- **Maintains integrity of IT architecture**
- **Reviews changes that:**
 - **Meet specific cost threshold, or**
 - **Meet specific labor threshold, or**
 - **Pose significant risk**

Change Management Infrastructure CM Tool Technology



	LAN	Mainframe
Primary Tool	All Fusion Harvest Change Manager	SCLM
Architecture	Distributed Client Server	Centralized

Change Management Infrastructure CM Tool Technology - LAN



	Existing	Planned
Primary Tool	Harvest 5.1	Harvest 7.1
Server Number and Type	(1) Production	(2) Production and Development
Operating System	Windows 2000	Windows 2003
Build Service	No	Yes
Web clients	No	Yes
Unix support	No	Yes
Database	Oracle 9i	Oracle 10g
UDPs	PERL 5.6.0.616	PERL 5.6.1.638

The Project Plan



The Project Plan

Motivation and Improvements



- **Motivation and Improvements**
- **Development**
- **Execution**

The Project Plan

Motivation and Improvements



- **History**
- **Project Mgt Training and Experience**
- **Improvements**

The Project Plan

Motivation and Improvements



- **History**

- **2003 : 2005 > Completed Harvest v4 – v5 upgrade.**
 - **Database conversion**
 - **Resource availability**
- **2005 : 2006 > Beginnings of Plan for CM Infrastructure Upgrade**
- **2007 > Planning Completed. Project Planned and Implemented.**

The Project Plan

Motivation and Improvements



- **Project Mgt Training and Experience**
 - **Classroom**
 - **Lean Thinking**
 - **Other Projects**

The Project Plan

Motivation and Improvements



- **Improvements – Making It Better, and a Wish List**
 - Using a Consultant
 - What is Your Vision ?

The Project Plan

Motivation and Improvements



- **Using a Consultant**
 - **Pros and Cons**
 - **Expert Knowledge is Valuable for Complex Installations**
 - **Cost Increases**
 - **Risk Management**
 - **Chemistry is Important**

The Project Plan

Motivation and Improvements



- **What is Your Vision ?**
 - **Two-server System**
 - **Web-based User Interface**
 - **Windows and UNIX client support**
 - **Build Tool Integration**

The Project Plan Development



- **Standard Templates and Forms**
- **You Can't Have Too Many Plans**
- **The Importance of the WBS**
- **Building the Team**
- **Secure Management Buy-In Early**

The Project Plan Development



- **Standard Templates and Forms**
- **You Can't Have Too Many Plans**
 - **Project**
 - **Risk Management**
 - **Configuration Management**
 - **Communications**
 - **Test**
 - **Acquisition**
 - **Security**

The Project Plan Development



- **Importance of the WBS**
 - Embodies definition of project scope
 - Improves accuracy of cost, time, resource estimates
 - Establishes project baseline estimates
 - Clarifies responsibility assignments

The Project Plan Execution



- **Commit to the Completion of Critical Tasks**
- **Use Your Status Meetings**
- **Use Your People Skills**
- **Reframe Your View of Technical Staff**

Lessons Learned



Lessons Learned



- **Plans and Contingencies**
 - Plan Carefully and Thoroughly
 - Anticipate Problems and Define Alternates
- **Murphy's Law**
 - Unplanned events will happen
 - Sometimes they expose plan defects
- **The Value of Project Management**
 - Develops organized view of work activities
 - Produces successful results

Summary



Summary

A Few Words to Review



- **Change Management tool maintenance is important**
- **Project Management knowledge is a powerful tool**
- **Focus is on objectives and results, not tool features**
- **Understand and use project skills effectively**
- **Increase Configuration Management's value to the organization**

Q&A



Related Sessions



SESSION #	TITLE	Date / Time
BC107SN	Change and Configuration Management: Strategy and Vision	11/17/2008 at 11 a.m.
BC115SN	Introducing CA Software Change Manager r12	11/17/2008 at 1:15 p.m.

- | SESSION EVALUATION | | | | | | | |
|---|--|--|--|--|--|--|---|
| PLEASE COMPLETE THIS FORM AND RETURN TO SESSION MONITOR. | | | | | | | |
| MARKING DIRECTIONS
• Use blue or black ink only.
• Fill circle completely
RIGHT WRONG
<input checked="" type="radio"/> <input checked="" type="radio"/> | FILL IN THE CIRCLE OF THE APPROPRIATE RATING:
Comprehension of subjects covered
EXCELLENT () () () () POOR | | | | | | |
| SESSION NUMBER
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| | Speakers preparedness & knowledge of subjects covered
EXCELLENT () () () () POOR | | | | | | |
| | Quality & Quantity of visual aids
EXCELLENT () () () () POOR | | | | | | |
| | Speakers ability to control discussions and keep session moving
<input type="radio"/> Excellent <input type="radio"/> Good <input type="radio"/> Poor | | | | | | |
| | Allocation of time among various subjects covered
<input type="radio"/> Too much time <input type="radio"/> Appropriate <input type="radio"/> Not enough time | | | | | | |
| | Is this session part of your:
<input type="radio"/> Primary conference <input type="radio"/> Another conference | | | | | | |
| | Were your expectations of this session met?
<input type="radio"/> Yes <input type="radio"/> No | | | | | | |

